



## ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

<b>DOD: 3-31-12</b>		<b>GREGORY TAYLOR</b> , Executor with Full IAEA without bond, is Petitioner.  Accounting is waived  I&A: \$277,794.06 (Cash) POH: \$277,794.06 (Cash)  Executor (Statutory): Waived  Attorney (Statutory): \$8,555.88  <b>Distribution pursuant to decedent's will, Article Fifth:</b> Christopher Taylor: \$10,000.00 Jeffrey Taylor: \$5,000.00 Nicole Taylor: \$5,000.00 Gregory Taylor, Sr. \$249,238.18  <b>Declaration of J. Todd Armas filed 10-15-14 states:</b> <ul style="list-style-type: none"> <li>Item 5(b) of the I&amp;A should have been marked and the requirements of Revenue and Taxation Code §480 have been satisfied.</li> <li>Property taxes on the subject real property have been paid and are up to date. In fact, the home sold for \$350,000.00 on or about 8-14-14.</li> <li>On 8-23-04, the decedent and her spouse signed a trust that Attorney Armas prepared for them, which provides for a distribution identical to the distribution set forth in the decedent's will. Attached are the relevant sections of the trust and the will, confirming that the distribution is identical.</li> <li>Although the trust was prepared and signed, Joseph and Juanita Mason never transferred any assets into the trust; therefore, there are no trust assets. Distribution should be pursuant to Article Fifth of the decedent's will.</li> <li>The Probate Examiner also questioned the interest earned in the decedent's accounts. All of the accounts were consolidated into one interest-bearing account. The interest was used to help the executor pay property taxes and related costs to prepare house for sale.</li> </ul>	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 11-20-14. Nothing further has been filed.  <u><b>SEE ADDITIONAL PAGES</b></u>	
<b>Cont from 112014</b>				
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>			
<input checked="" type="checkbox"/>	<b>Verified</b>			
<input checked="" type="checkbox"/>	<b>Inventory</b>			
<input checked="" type="checkbox"/>	<b>PTC</b>			
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>			
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>			W
<input type="checkbox"/>	<b>Aff.Mail</b>			
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<input type="checkbox"/>	<b>Pers.Serv.</b>			
<input type="checkbox"/>	<b>Conf. Screen</b>			
<input checked="" type="checkbox"/>	<b>Letters</b>	11-9-12		
<input type="checkbox"/>	<b>Duties/Supp</b>			
<input type="checkbox"/>	<b>Objections</b>			
<input type="checkbox"/>	<b>Video Receipt</b>			
<input type="checkbox"/>	<b>CI Report</b>			
<input checked="" type="checkbox"/>	<b>9202</b>			
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<input type="checkbox"/>	<b>Status Rpt</b>			
<input type="checkbox"/>	<b>UCCJEA</b>			
<input type="checkbox"/>	<b>Citation</b>			
<input checked="" type="checkbox"/>	<b>FTB Notice</b>			

**NEEDS/PROBLEMS/COMMENTS:**

1. The original Inventory and Appraisal filed 11-2-12 totaled \$504,522.95 as of the date of Decedent's death, 3-31-12, including the following:
  - \$204,522.95 cash including Western National Policy, four Morgan Stanley accounts, and a Golden 1 Credit Union account
  - Real property valued at \$300,000.00

The prior petition included the house as property on hand to be distributed; however, mention of preparation of the house for sale caused Examiner to check public real estate records, which indicated that the house was actually sold in August 2014. Attorney Armas' Declaration filed 10-15-14 confirms this information.

In addition, there was a question of whether the house was this decedent's community or separate property, because of Petitioner's confusing proposed distribution.

It was then determined that the same house, in its entirety, has also been inventoried as an asset of this decedent's spouse in the Estate of Joseph Mason 14CEPR00064.

Examiner Notes from the Third Amended Petition heard on 9-18-14 raised a number of issues in connection with the above information provided.

Now, Petitioner has filed an Amended Inventory and Appraisal that simply indicates \$277,794.06 cash and states: "The above sum represents the separate property of Juanita Mason. There is an additional \$277,794.06 that is assigned to the Estate of Joseph Mason as his community property interest and not subject to distribution by this estate."

This Amended I&A filed 10-15-14, with one line item of cash only, does not appear to be an accurate representation of the decedent's assets at her date of death. If Petitioner meant to clarify that the assets included on the prior I&A were community property of the decedent and her husband, this is not an appropriate way to do so. The Court may require clarification or further amended I&A.

2. If it is determined that the Amended I&A filed 10-15-14 is correct, need clarification as to how one lump sum of cash remained exactly the same from March 2012 to now, as Petitioner states that same amount is the amount of property on hand for distribution.

Alternatively, if it is determined that the house and accounts listed on the I&A were assets of the decedent's at her date of death, need further amended I&A and amended petition containing information regarding the changes in the forms of these assets per Cal. Rule of Court 7.550.

3. The above issues affect the calculation of statutory compensation.

**SEE ADDITIONAL PAGES**

**NEEDS/PROBLEMS/COMMENTS (Continued):**

4. As previously noted, the decedent's will distributes her estate to the Mason Family Trust of 2004. Petitioner states that the trust was never funded; therefore, distribution should be made directly to heirs pursuant to Article Fifth of the decedent's will. Examiner Notes previously noted that the trust did appear to have been funded by the execution of Schedule A Transfer of Assets; therefore, distribution should be made to the Trust pursuant to Article Third of the Will, and a declaration pursuant to Local Rule 7.12.5 is needed.

Attorney Armas continues to assert his original position regarding the trust and requests distribution directly to the heirs; however, no authority is provided.

Examiner notes, also, that Article Fifth of the will does not appear to distribute directly to the heirs as requested; rather, it appears to create a testamentary trust based on the 2004 trust.

5. The decedent's husband, Joseph Mason, died 1-21-13. The original petition for final distribution in this estate was filed 1-23-14 and included a waiver of accounting signed by Cheryl Mason "Power of Attorney for Joseph Mason." A Power of Attorney does not have authority to waive accounting on behalf of a beneficiary; however, it appears this was previously overlooked among the myriad of other issues. At this time, Cheryl Mason (represented by Attorney Armas) is now the Executor of the Estate of Joseph Mason. Also, as a note: It does not appear that the I&A filed 2-25-14 in that estate, which includes the house and other accounts, has been corrected yet.

**Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution**

<b>DOD: 07/04/12</b>		<b>WILLIAM MARTIN (MARTY) SHIBA</b> , son, was appointed Executor with full IAEA and without bond on 03/28/13. Letters Testamentary were issued on 03/29/13.  Inventory & Appraisal, final filed 07/15/13 - \$68,775.68  <b>Status Report</b> filed 07/28/14 states: The office is currently in the process of preparing the petition and first account current in this matter. There is a Medi- Cal claim filed against the estate as well as a trust for this estate that is also considered in the estate plan. The executor and his attorney are currently in the process of completing negotiations and settlement of a dispute regarding the Medi-Cal claim. It is requested that this status hearing be continued for 45 days to allow time for the executor and his attorney to complete negotiations on the claim and to file the first account and report reflecting said negotiation and settlement.  <b>Status Report</b> filed 09/16/14 states: the attorney is currently preparing the petition and first account current in this matter. There is a medi-cal claim filed against the estate as well as a trust for this estate that is also considered in the estate plan. The executor and attorney are currently working with the DHS regarding the claim filed by them in this matter. They are experiencing difficulties getting a timely response from the DHS regarding negotiations. An additional 90 day continuance is requested.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>CONTINUED FROM 09/17/14</u></b>  1. Need First Account/Report of Executor and Petition for Final Distribution <u>and/or</u> current written status report.
<b>Cont. from 053014, 063014, 073014, 091714</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>		<b>Reviewed by:</b> JF <b>Reviewed on:</b> 01/12/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 4 - Shiba</b>	
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
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<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

## First Amended Petition to Determine Succession to Real Property

DOD: 6-28-99		SCOTT BUSCH, Special Administrator of the Estate of Lila Busch, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	<u>Note:</u> This petition appears dependent on Petitioner being appointed as Special Administrator of the Estate of Lila Busch pursuant to the related petition at Page 11 of this calendar.
		No other proceedings	
	Aff.Sub.Wit.		<u>Note:</u> Page 10 is a related Petition to Determine Succession to Real Property for Decedent Lila Busch, which appears dependent on this petition being granted, as it passes the interest being passed here to her heir.
✓	Verified		
✓	Inventory		<u>Note:</u> Per Attachment 14, Lila Busch (DOD 10-7-08) is the post-deceased spouse of this decedent.
	PTC		
	Not.Cred.		<u>Note:</u> Attorney is reminded to ensure that all double-sided documents are properly tumbled pursuant to Cal. Rule of Court 2.134.
	Notice of Hrg	x	
	Aff.Mail	x	1. Need appointment as Special Administrator of the Estate of Lila Busch. (See Page 11.)
	Aff.Pub.		
	Sp.Ntc.		2. Need Notice of Hearing.
	Pers.Serv.		
	Conf. Screen		3. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §13153 on: - Michael Busch (son) - Erin Busch (granddaughter)
	Letters		
	Duties/Supp		4. Need dates of death of all deceased relatives listed at Attachment 14 pursuant to Local Rule 7.1.1.D.
	Objections		
	Video Receipt		Reviewed by: skc
	CI Report		Reviewed on: 1-12-15
	9202		Updates:
✓	Order		Recommendation:
	Aff. Posting		File 5 - Busch
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

<b>DOD: 01/18/14</b>	<b>SANDRA BROWN</b> , named Executor without bond, is Petitioner.		<b>NEEDS/PROBLEMS/COMMENTS:</b>
	Full IAEA – OK		
	Will dated 01/12/01		<b>CONTINUED FROM 11/20/14</b> <b>Minute Order from 11/20/14 states: Mr. Farmer is to file a Petition for a Lost Will.</b>
<b>Cont. from 080714, 100214, 112014</b>	Residence: Fresno Publication: The Business Journal		
✓ <b>Aff.Sub.Wit.</b>		<b>Estimated Value of the Estate:</b> Personal property - \$ 50,000.00 Real property - 86,000.00 <b>Total - \$136,000.00</b>	<b>As of 01/12/15 a Petition for Lost Will has not been filed and the following issues remain:</b> 1. The petition states that the decedent's original will was lost as it could not be located after his death. Pursuant to Probate Code § 6124, there is a presumption that the testator destroyed the will with an intent to revoke it if the original is unable to be located after the testators death and the original will was last in the testators possession. Petitioner does not allege any facts rebutting the presumption that decedent destroyed the will with intent to revoke it. Need more information/evidence that the testator did not destroy the will with intent to revoke it. 2. The Letters are not dated. Need Letters that are signed and dated. 3. The Petition is incomplete at item 5(a)(7) or (8) regarding issue of a predeceased child. 4. The Petition indicates that two beneficiaries of the will, Paulette Hayes and Ezola Ridley, are deceased. Pursuant to Local Rule 7.1.1D - If a beneficiary, heir, child, spouse, or registered domestic partner in any action before the Probate Court is deceased, that person's date of death shall be included in the petition.
✓ <b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
✓ <b>Notice of Hrg</b>			
✓ <b>Aff.Mail</b>	w/		
✓ <b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>		<b>Declaration of Sandra Brown, filed 12/31/14 states:</b> She knew Mr. Robinson as a father figure from the time she was 6 years old up until his death. He spoke to her a number of times regarding his estate and in 2010 he showed her and discussed his will and how he wanted his final arrangements organized. In 2011, he once again showed her the will that is attached to her Petition for Probate and stated that these were his wishes and that nothing is to be or would be changed.  <b>Note: If the petition is granted status hearings will be set as follows:</b>  • <b>Thursday, 06/11/15 at 9:00a.m. in Dept. 303</b> for the filing of the inventory and appraisal <u>and</u> • <b>Thursday, 03/10/16 at 9:00a.m. in Dept. 303</b> for the filing of the first account and final distribution.  Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required	
✓ <b>Letters</b>			
✓ <b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
✓ <b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			

**Ex Parte Petition for Order Regarding Transfer of Money Belonging to Minor to Custodian Under the California Uniform Transfers to Minors Act [§3413]**

		<b>BRENDA C. LAING</b> is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b> 1. Need proof of service of Notice of Hearing on the minor Emily Elizabeth Laing and any other interested persons pursuant to Order dated 9-23-14.  2. This petition was filed as an "estate" matter titled with the decedent's name. However, it appears the title should be amended to reflect the minor's name, as it will govern access to her funds and is not connected with any probate estate matter for this decedent. The Court may order the title amended to: In Re: Emily Elizabeth Laing.  3. The Court may require further information regarding the estate of the decedent with reference to the use of CUTMA rather than establishing a guardianship estate (§3413). Is this the only asset that is expected to pass to the Emily? Is Petitioner aware of whether there will be any proceeding (probate or other) for the decedent's estate?  4. It is the policy of the Court to order funds placed into a blocked account for this type of petition, accessible upon the minor's 18 <sup>th</sup> birthday. Examiner has prepared the Order to Deposit Money Into Blocked Account (MC-355) for the Court's signature, if granted.  5. Need revised order to reflect deposit into blocked account and revised case title.  6. Additionally, if granted the Court will set a status hearing for the filing of the Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account (MC-356) as follows: - Thursday January 8, 2015 If the receipt is on file, the Court may take the matter off calendar.
		Petitioner filed this <b>Ex Parte Petition for Order Regarding the Transfer of Money Belonging to Minor to Custodian under the California Uniform Transfers to Minors Act</b> on 9-22-14.  On 9-23-14, the Court set the matter for hearing, with notice to be served on all interested parties. The order setting the matter for hearing was mailed to Petitioner on 9-26-14.  <b>Petitioner states</b> she is the mother and custodial parent of minor <b>EMILY ELIZABETH LAING</b> . The estate consists of money in the sum of approx. \$17,000.00 of life insurance proceeds obtained from The Guardian Life Insurance Company of America, Group Plan No. xxx, purchased by the decedent's employer, The Fresno Rescue Mission. Emily is designated as the sole beneficiary. See attached.  Probate Code §3413(b) provides that if there is no guardian of the estate, the Court may order that all or any part of the money be transferred to a custodian for the benefit of the minor under the California Uniform Transfers to Minors Act. Probate Code §3413(c) provides that if the money does not exceed \$20,000.00, the money may be held on any other condition that the court in its discretion determines to be in the best interests of the minor.  It would be in the best interests of the minor to transfer the life insurance proceeds to Petitioner, her mother. Emily has at all times resided with Petitioner and Petitioner is in the best position to know the best interests of her daughter.  Petitioner respectfully requests that the Court use its discretion to order the transfer of the life insurance proceeds in the approximate amount of \$17,000.00 to Petitioner Brenda C. Laing as custodian for the benefit of the minor Emily Elizabeth Laing.  Attached are the decedent's death certificate and a copy of the life insurance designation form naming Emily as beneficiary.	
Cont from 103014			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail		
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	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc Reviewed on: 1-12-15 Updates: Recommendation: File 7 – Leiker



**Petition to Determine Succession to Real Property (Prob. C. 13151)**

<b>DOD: 2-2-14</b>        <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%;"></td> <td style="width: 85%;"><b>Aff.Sub.Wit.</b></td> <td style="width: 10%;"></td> </tr> <tr> <td style="text-align: center;">✓</td> <td><b>Verified</b></td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td><b>Inventory</b></td> <td></td> </tr> <tr> <td></td> <td><b>PTC</b></td> <td></td> </tr> <tr> <td></td> <td><b>Not.Cred.</b></td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td><b>Notice of Hrg</b></td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td><b>Aff.Mail</b></td> <td style="text-align: center;">w</td> </tr> <tr> <td></td> <td><b>Aff.Pub.</b></td> <td></td> </tr> <tr> <td></td> <td><b>Sp.Ntc.</b></td> <td></td> </tr> <tr> <td></td> <td><b>Pers.Serv.</b></td> <td></td> </tr> <tr> <td></td> <td><b>Conf. Screen</b></td> <td></td> </tr> <tr> <td></td> <td><b>Letters</b></td> <td></td> </tr> <tr> <td></td> <td><b>Duties/Supp</b></td> <td></td> </tr> <tr> <td></td> <td><b>Objections</b></td> <td></td> </tr> <tr> <td></td> <td><b>Video Receipt</b></td> <td></td> </tr> <tr> <td></td> <td><b>CI Report</b></td> <td></td> </tr> <tr> <td></td> <td><b>9202</b></td> <td></td> </tr> <tr> <td style="text-align: center;">✓</td> <td><b>Order</b></td> <td></td> </tr> <tr> <td></td> <td><b>Aff. Posting</b></td> <td></td> </tr> <tr> <td></td> <td><b>Status Rpt</b></td> <td></td> </tr> <tr> <td></td> <td><b>UCCJEA</b></td> <td></td> </tr> <tr> <td></td> <td><b>Citation</b></td> <td></td> </tr> <tr> <td></td> <td><b>FTB Notice</b></td> <td></td> </tr> </table>		<b>Aff.Sub.Wit.</b>		✓	<b>Verified</b>		✓	<b>Inventory</b>			<b>PTC</b>			<b>Not.Cred.</b>		✓	<b>Notice of Hrg</b>		✓	<b>Aff.Mail</b>	w		<b>Aff.Pub.</b>			<b>Sp.Ntc.</b>			<b>Pers.Serv.</b>			<b>Conf. Screen</b>			<b>Letters</b>			<b>Duties/Supp</b>			<b>Objections</b>			<b>Video Receipt</b>			<b>CI Report</b>			<b>9202</b>		✓	<b>Order</b>			<b>Aff. Posting</b>			<b>Status Rpt</b>			<b>UCCJEA</b>			<b>Citation</b>			<b>FTB Notice</b>		<p><b>RUTH ORONA</b>, Daughter, and  <b>CALIFORNIA BAPTIST FOUNDATION</b>, are          Petitioners.</p> <p>40 days since DOD</p> <p>I&amp;A: \$100,000.00</p> <p>Will dated "February __, 2010" states:          "To Ruth Orona my daughter, I give my          real property located at 4776 E.          Thomas Street in the county of Fresno,          state of California, more particularly          described as follows: [See will]. After          the sale of the house, a trust fund will          be established by the California Baptist          Foundation., 20% of the sale of said          property will be given to whomever, as          determine by the Executor, as long as          it is to enhance the Kingdom of God in          Hispanic Ministries."</p> <p>Petitioners request Court determination          that the real property passes 80% to          Petitioner Ruth Orona and 20% to          California Baptist Foundation.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>5. The original will has not been          deposited with the Court pursuant to          Probate Code §8200.</p> <p>6. The decedent's will is undated and is          not self-proving. The Court may          require Proof of Subscribing Witness          (DE-131).</p> <p>7. The decedent's will appears to          devise her real property in its entirety          to her daughter Ruth Orona.          Although the will provides precatory          direction as to how the proceeds,          once the property is sold, should be          distributed, a summary proceeding          such as this can only pass the real          property to the proper successor in          interest, which is Ruth Orona only.          Need authority for order as          requested.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td><b>Reviewed by:</b> skc</td> </tr> <tr> <td><b>Reviewed on:</b> 1-12-15</td> </tr> <tr> <td><b>Updates:</b></td> </tr> <tr> <td><b>Recommendation:</b></td> </tr> <tr> <td><b>File 8 - Bernal</b></td> </tr> </table>	<b>Reviewed by:</b> skc	<b>Reviewed on:</b> 1-12-15	<b>Updates:</b>	<b>Recommendation:</b>	<b>File 8 - Bernal</b>
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**Petition to Determine Succession to Real Property (Prob. C. 13151)**

<b>DOD: 10-7-08</b>		<b>SCOTT BUSCH</b> , Son, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> Lila Busch is the post-deceased spouse of Christian Busch. It appears this petition is dependent on Petitioner being appointed as Special Administrator of the Estate of Lila Busch pursuant to the related petition at Page 11 of this calendar in order to pass Decedent Christian Busch's one half interest in the real property to the Special Administrator of the Estate of Lila Busch at Page 5 of this calendar.  8. The original will has not been deposited with the Court pursuant to Probate Code §8200.  9. Need I&A pursuant to Probate Code §13152(a)(2). <u>Note:</u> An I&A reflecting the decedent's 100% interest in the real property as of her date of death at \$125,000.00 was filed into Case 14CEPR01085 connection with Petitioner's Petition for Appointment as Special Administrator (Page 11); however, it appears that I&A would have been more appropriately filed in this matter.  10. Need Notice of Hearing.  11. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §13153 on: - Michael Busch (son) - Erin Busch (granddaughter)  12. Need dates of death of all deceased relatives listed at Attachment 14 pursuant to Local Rule 7.1.1.D.  <u>Note:</u> Attorney is reminded to ensure that all double-sided documents are properly tumbled pursuant to Cal. Rule of Court 2.134.
		40 days since DOD	
		No other proceedings	
	<b>Aff.Sub.Wit.</b>	I&A: Need	
✓	<b>Verified</b>	Will dated 11-13-07 devises the residue of the decedent's estate to Petitioner.	
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
	<b>Notice of Hrg</b>	Petitioner requests Court determination that the decedent's 100% interest in real property located at 921 DeWitt in Sanger, CA, passes to Petitioner pursuant to Decedent's will.	
	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 1-12-15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File</b> 10 - Busch

**Special Administration without General Powers without Probate**

<b>DOD: 10-7-08</b>		<b>SCOTT BUSCH</b> , Son, is Petitioner and requests appointment as Special Administrator with Full IAEA without bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <u>Note:</u> Attorney is reminded to ensure that all double-sided documents are properly tumbled pursuant to Cal. Rule of Court 2.134.  <u>Note:</u> Page 10 is a related Petition to Determine Succession to Real Property for this decedent.  13. Need Confidential Supplement to Duties and Liabilities of Personal Representative DE-147S.  14. Need Notice of Hearing.  15. Need proof of service of Notice of Hearing at least 15 days prior to the hearing pursuant to Probate Code §13153 on: - Michael Busch (son) - Erin Busch (granddaughter)  16. Petitioner does not state the grounds for appointment of a Special Administrator pursuant to #3f(3). Need clarification pursuant to Probate Code §8540(b). <u>Note:</u> Although this petition appears to relate to separately filed other matters, the information should be stated in this petition.  17. Petitioner requests authority under IAEA; however, such authority would require publication. Need clarification.  18. Need dates of death of all deceased relatives listed at #8 pursuant to Local Rule 7.1.1.D, including the deceased spouse and children of this decedent.  19. Need revised Order specifying the powers of the Special Administrator at Attachment 3d(2) pursuant to #4 above.  20. Need Letters of Special Administration. <u>Note:</u> The Court may require clarification regarding anticipated time frame for the Special Administrator to complete the necessary actions as specified pursuant to #4 above for purposes of specifying an expiration date.
		Petitioner does not state a reason for special administration. There is no Attachment 3f(3).	
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
	<b>Notice of Hrg</b>	x	
	<b>Aff.Mail</b>	x	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>	x	
✓	<b>Duties/Supp</b>	x	
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
✓	<b>Order</b>	x	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
			<b>Reviewed by:</b> skc
			<b>Reviewed on:</b> 1-12-15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 11 - Busch</b>

**Probate Status Hearing RE: Proof of Increased Bond**

			<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b><u>OFF CALENDAR</u></b>  Increased bond was filed 12-31-14.
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 1-12-15
			Updates:
			Recommendation:
			File 13 - Adona

<b>DOD: 4-4-12</b>  <b>Cont from 082313, 101113, 121313, 021414, 041514, 061714, 090414, 011515</b>	<p><b>LOUIS WAYNE WIEBE</b>, Son, was appointed Executor with Full IAEA without bond and Letters issued on 6-25-12.</p> <p>On 6-25-13, the Court set this status hearing for the filing of the first account or petition for final distribution.</p> <p><b>Status report filed 6-16-14 states</b> the estate has been liquidated and is in a position to close. However, to creditors of the estate have issued a form 1099-C, cancellation of debt for 2013, even though the estate has not closed. The attorney contacted the claimants to determine if the 1099-C is intended as a waiver of their claims against the estate and both confirmed. However, the issuance of the 1099-C forms causes implications that were not anticipated, and the cancellation of debt results in taxable income of \$15,562.97 for the estate and a return will need to be filed for calendar year 2013. Therefore, additional time is needed.</p> <p><b>Status report filed 9-3-14 states</b> the cancellation of indebtedness resulted in taxable income for 2013 requiring income tax return for the estate. Additional time is needed to complete and file the proper fiduciary income tax returns. The estate will likely be closed as an insolvent estate. Mr. Simonian will attend the hearing.</p> <p><b>Status report (unverified) filed 11-5-14 by Attorney Simonian states</b> he is in the process of preparing a list of assets on hand, administration expenses that have not been paid, a calculation of the amount of statutory and extraordinary fees for the personal representative and attorney, and a proposed allocation for the payment of the remaining estate pro rata to the general creditors. Mr. Simonian will attend the hearing on 11-6-14 and can address additional questions at that time.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 11-6-14:</b> The Court grants one last continuance for status on this matter. If the Petition is not filed prior to the next hearing, then Louis Wiebe must be present on 1/15/15. Continued to: 01/15/15</p> <p><b>As of 1-12-15, nothing further has been filed.</b></p> <p><b>Note:</b> I&amp;A filed 11-27-12 indicates a total estate value of \$208,915.73 consisting of cash and various real and personal property.</p> <p><b>Note:</b> There are four (4) separate creditor's claims filed in this estate.</p> <ol style="list-style-type: none"> <li>1. Need first account or petition for final distribution or verified written status report pursuant to Local Rule 7.5.</li> <li>2. Need proof of service of Notice of Hearing on Wells Fargo Card Services per Request for Special Notice filed 6-5-12.</li> </ol>																																																			
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%;">Aff.Sub.Wit.</td><td style="width: 50%;"></td></tr> <tr><td>Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td></td></tr> <tr><td>Aff.Mail</td><td></td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>	Aff.Sub.Wit.		Verified		Inventory		PTC		Not.Cred.		Notice of Hrg		Aff.Mail		Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order		Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td><b>Reviewed by:</b> skc</td></tr> <tr><td><b>Reviewed on:</b> 1-12-15</td></tr> <tr><td><b>Updates:</b></td></tr> <tr><td><b>Recommendation:</b></td></tr> <tr><td><b>File 14 – Wiebe</b></td></tr> </table>		<b>Reviewed by:</b> skc	<b>Reviewed on:</b> 1-12-15	<b>Updates:</b>	<b>Recommendation:</b>	<b>File 14 – Wiebe</b>
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<b>Recommendation:</b>																																																					
<b>File 14 – Wiebe</b>																																																					

<b>DOD: 02/14/12</b>		<p><b>RICHARD DEWAYNE PHILLIPS</b>, father, was appointed Administrator with Full IAEA and without bond on 12/04/12.</p> <p><b>Minute Order from hearing on 12/04/12 set this matter for status regarding filing of the Inventory &amp; Appraisal.</b></p> <p><b>Status Report filed 01/08/15</b> by Richard Dewayne Phillips, states: On 04/15/13, Petitioner, in his capacity as personal representative of decedent's estate, filed a complaint against the County of Fresno and other defendants in United States District Court, Eastern District of California, alleging violation of the decedent's civil rights. The lawsuit is based on the fact that decedent was murdered while in custody of Fresno County. The complaint was filed by Anthony Boskovich, Esq. of the Law Office of Anthony Boskovich in association with the law firm of Bode &amp; Grenier, LLP. On 06/11/13, the County of Fresno filed a Motion to Dismiss the lawsuit. On 12/03/13, the Court granted the motion in part and denied the motion in part. On 12/13/13, the parties appeared before the Court for a scheduling conference. At that time, the lawsuit was set for jury trial on 02/24/15. On 12/31/13, Petitioner filed a First Amended Complaint against all defendants, including the County of Fresno. On 07/14/14, the parties submitted a stipulation modifying the Court's prior scheduling order. Under the terms of the stipulation, trial has been continued to 06/23/15. The defendants hired attorney James D. Weakley and James Arendt on 07/24/14. On 10/16/14 the trial court entered an order extending discovery deadlines through 03/12/15. At this time there are no assets in the Decedent's estate except for the causes of action currently being litigated in federal court. Petitioner requests the Court set a further status conference in August or September 2015.</p> <p><b>Order Approving Contingency Fee Agreement</b> was filed 08/15/13.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u><b>CONTINUED FROM 07/25/14</b></u></p> <p>1. Need Inventory &amp; Appraisal.</p>
<b>Cont. from 042613, 072514</b>			
<b>Aff.Sub.Wit.</b>			
<b>Verified</b>			
<b>Inventory</b>			
<b>PTC</b>			
<b>Not.Cred.</b>			
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>			
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<p><b>Reviewed by:</b> JF</p> <p><b>Reviewed on:</b> 01/12/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 15 – Phillips</b></p>	

		<b>NEEDS/PROBLEMS/COMMENTS:</b>
	<b>Petition for Order Approving Stipulation for Settlement; for Appointment of Successor Trustee of Bypass Trust (Trust B); and for Order Modifying Terms of Irrevocable Trusts</b> was heard on 12-11-14.	
	<b>Minute Order 12-11-14:</b> Marian Austin is appointed as Successor Trustee, without bond. Ms. Burnside will prepare an order. The Court is approving the Stipulation to Settlement filed on 9-15-15. Parties state their agreement to the following in open court: See minute order for details.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>		
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
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<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>	<p><b>Order After Hearing</b> was signed 1-5-15.</p> <p><b>Status Report filed 1-9-15 by Attorney Burnside states</b> Trustee Jeffrey Boyajian issued instructions to Wells Fargo Advisors to initiate the transfer of certain Franklin Fund securities to the existing Bypass Trust account. Mr. Boyajian issued those instructions by the contemplated date of 12-16-14. The attorney understands that the securities have been transferred to the Bypass Trust Account. Additionally, on 12-31-14, Mr. Boyajian released the required income distribution checks to Andrew Boyajian Branche, Cody Branche Boyajian, and Alan Boyajian Branche. Also that day, Petitioner Phyllis K. Branche delivered to Ms. Burnside's office her payment of \$20,331.55 to Mr. Boyajian.</p> <p>At this time, the terms of the settlement that remain to be performed are the scanning and dissemination of the family photographs, and the retrieval of personal property items. Respondents Mr. Boyajian and Ms. Courtis are waiting for Ms. Branche to deliver scanned copies of the photographs in her possession to Ms. Courtis. She has until 3-31-15 to do so. In turn, Ms. Courtis has until 12-31-15 to complete the scanning of all other Boyajian family photographs in her possession, and deliver same, to Ms. Branche.</p> <p>Likewise, the parties have until 3-31-15 to complete the distribution and retrieval of personal property.</p> <p>Once the Order After Hearing is signed the by the court, the newly appointed successor trustee of the Bypass Trust, Marion Austin, can begin administering the trust for the benefit of Ms. Branche's three sons.</p>	<div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Reviewed by: skc</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Reviewed on: 1-12-15</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Updates:</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 2px;">Recommendation:</div> <div style="border: 1px solid black; padding: 2px;">File 17- Boyajian</div>

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

<b>Age: 5</b>		<b><u>TEMPORARY EXPIRES 10/30/14</u></b>		<b>NEEDS/PROBLEMS/COMMENTS:</b>	
		<b>ELIZABETH JIMENEZ</b> , Maternal Aunt, and <b>MARY JIMENEZ</b> , Maternal Grandmother, are Petitioners.		<b><u>CONTINUED FROM 10/30/14</u></b>	
		Father: <b>JERRY LESLIE GARCIA</b>		<b>Minute Order from 10/30/14 states:</b>	
<b>Cont. from 103014</b>		- Declaration of Due Diligence filed 9-5-14		<b>Mother is to provide the Clerk's office with her address. The mother is not in favor. The Court dispenses with further notice as to father. Mediation today at 10:30am regarding visitation.</b>	
	<b>Aff.Sub.Wit.</b>		Mother: <b>ESMERITA JIMENEZ</b>		
✓	<b>Verified</b>		- Declaration of Due Diligence filed 9-5-14		
	<b>Inventory</b>		Paternal Grandfather: Unknown		
	<b>PTC</b>		Paternal Grandmother: Unknown		
	<b>Not.Cred.</b>		Maternal Grandfather: Manuel Jimenez, Jr. – Consent & Waiver of Notice filed 09/05/14		
	<b>Notice of Hrg</b>	x	Siblings: Ricki Renee Garcia, Richard Garcia – Consent & Waiver of Notice filed 09/05/14		
	<b>Aff.Mail</b>	x	<b>Petitioners state</b> that the mother is a meth addict and is unable and unwilling to provide care for the minor. She is currently on a drug binge and has once again left the minor in the maternal grandparents care. The minor was only recently returned to his mother's care, as the court terminated the previous guardianship in April 2014. The mother is unwilling and unable to stay clean and sober to provide for her child.	1. Need Notice of Hearing.	
	<b>Aff.Pub.</b>			2. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:	
	<b>Sp.Ntc.</b>			a. Jerry Garcia (father) – personal service required, unless diligence is found	
	<b>Pers.Serv.</b>			b. Esmerita Jimenez (mother) – personal service required, unless diligence is found	
✓	<b>Conf. Screen</b>			c. Paternal grandparents (unknown) – service by mail sufficient	
✓	<b>Letters</b>				
✓	<b>Duties/Supp</b>				
	<b>Objections</b>		<b>Court Investigator Julie Negrete filed a report on 10/15/14.</b>		
	<b>Video Receipt</b>				
✓	<b>CI Report</b>			<b>Reviewed by:</b> JF	
	<b>9202</b>			<b>Reviewed on:</b> 01/12/15	
✓	<b>Order</b>			<b>Updates:</b>	
	<b>Aff. Posting</b>			<b>Recommendation:</b>	
	<b>Status Rpt</b>			<b>File 22 – Garcia</b>	
✓	<b>UCCJEA</b>				
	<b>Citation</b>				
	<b>FTB Notice</b>				



## Petition for Visitation

		JESUS N. GONZALEZ, Father, filed this Petition for Visitation on 5-7-13.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute Order 1-12-15:</b> The Court orders Ms. Ibarra to cancel the 1-13-15 counseling appointment. Mr. Gonzalez is to determine whether or not his insurance will cover counseling at the Sullivan Center. Parties are to make a new appointment that both are able to attend and report all information back to the Court on Thursday. Matter continued to 1-15-15.	
Cont. from 061113, 073013, 091013, 100813, 121313, 030314, 042114, 062314, 081814, 111714, 011215				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/o
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
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<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
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<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 1-12-15	
			Updates:	
			Recommendation:	
			File 32 – Rodriguez	